



ASSEMBLY

- Through a secure, multi-user solution
 - Enter – real time
 - Save – real time
- Qualifying CD Activities. Effective reporting and analysis depends on having data you can trust.
- Data, Reports & Onboarding
 - Data entry capability
 - Export reports to Excel
 - List styles, note fields, expanded or abbreviated
- Security Management
 - Individual Security Restriction Controls
 - Concurrent Multi-User
 - Network Capability

ANALYSIS

- Each CRA Exam has two or three parts, depending on your bank's size and standing: Lending, Service, and Investment tests; or Lending and Community Development. How do you easily collect and report it all?
 - Segment / Sort
 - Report
 - Analyze
- CDTrax is complete with advanced segmentation tools, and easy-to-establish filters on the fly. Easily select investment or service types, branches, impact areas, or non-profits you're working with.

ACTION

- Communicate performance. Collect, qualify and report internally and to examiners both your Service and Investment activity overall, and by each of your Assessment Areas. Breakout results:
 - Affordable Housing
 - Community Services
 - Economic Development
 - Revitalization of Low and Moderate Income Areas/Geographies
- **All banks, regardless of size** must make this information available to the examiners during their CRA exam.